FIG. 6

Application Designer-Untitled-RC_CASE_HD.ENG(Page)

File Edit View Insert Build Debug Tools Layout Go Favorites Window Help

RC_CASE_HD.ENG (Page)

Page Designer | Order

Name:

Department:

Phone Type:

Email Type:

Preferred Contact
Method:

Alt. Contact:

Product:

Asset Tag:

Summary:

Description:

Summary:

Business Unit:

Location:

Phone:

Email:

Preferred Contact
Details:

Source:

Installed

Untitled

Build / Find Object Reference / Upgrade / Results / Validate

Ready

NUM

610
620
650
640
660

FIG. 8

275

Administer Personalization Opt- Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back · · ⊗ 🖸 🏠 | ⚲Search Favorites ⚲History | 🖷 · 🖷 🖷 | 🕅 · ⅋ 🙎 | A · å̃ ·

Address http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

PEOPLE Soft

Home>PeopleTools>Maintain Security>Use> Administer Configuration

@Home   View Worklist   ?Help   New Window   Sign Out

Administer Configuration Options

Option Description	Image	Enable Option	Allow User Value	Default Value
ACCESS Accessibility Features	Explain	☑	☑	N
ADBTN Tab over Add/Del Buttons(+/-)	[+] Explain	☐	☑	
ADES Afternoon designator (PM, pm)	Explain	☑	☑	RM
CALBTN Tab over Calendar Button	[icon] Explain	☐	☐	
CSYM Currency Symbol	Explain	☑	☑	$
CSYM Currency Symbol	Explain	☑	☑	L
DCSP Decimal Separator	Explain	☑	☐	.
DFRMT Date Format	Explain	☑	☑	M
EXPENT Expert Entry	Explain	☑	☑	N
GRDTAB Tab over Grid Tabs	Explain	☐		
HDRICN Tab over Header Icons	Explain	☐		
LKPBTN Tab over Lookup Button	[icon] Explain	☐		
LTZONE Local Time Zone	Explain	☑	☑	PST
MDES Morning designator (AM, am)	Explain	☑	☑	AM

820   810   840   850   860   830

Local intranet

Done

FIG. 10A

Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back ▾ ⇨ ▾ ⊗ ◌ ⚙ | ⬚Search ☆Favorites ⟳History | 🖫▾ ⬛ ▾ 𝔚 ▾ 𝔶 ⊠ | A▾ å♔▾

Address 🔖 http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&   ⌁Go ‖Links »

PEOPLE SOFT

@Home   View Worklist   ? Help   → Sign Out

New Window

Home>PeopleTools>Maintain Security>Use> My Profile

General Profile Information

Oprid for CRMSKT, CRMQABAK

Password

Change password

Change or set up forgotten password help

Personalization

Changes to Personalization settings require you to log off and log back on in order to take effect.

My preferred language for reports and email is: English ▾

Currency Code: 🔍

Set Personalizations

Email

Email Address:

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID: 🔍

From Date: 📅   (example: 12/31/2000)

To Date: 📅   (example: 12/31/2000)

Miscellaneous User Links

🖳 Local intranet

270

1005

1010

1020

FIG. 10B

Administer Personalization Opt-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back ▪ ⟶ ⊗ ⊙ ⌂ | Search Favorites History | ▤▾ ❹ W ▾ ☒ ▾ ❥ ☒ | A ▾ ẫ ▾

Address http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

270

PEOPLE Soft

Home>PeopleTools>Maintain Security>Use> My Profile

@ Home   ⓘ View Worklist   ? Help   ⊕ Sign Out

New Window

Personalization

Option	Default Value	Override Value	
		1040	1050
Accessibility Features	No	☒	Explain
Afternoon designator (PM, pm)	PM		Explain
Currency Symbol	$		Explain
Currency Symbol Position	Leading	☒	Explain
Decimal Separator			Explain
Date Format	MM/DD/YY	☒	Explain
Date Separator	/		Explain
Local Time Zone	Pacific Time, Tijuana	☒	Explain
Morning designator (AM, am)	AM		Explain
Multiple Row Insert	⊞ Yes	☒	Explain
Save Configuration	Yes		Explain
Save Warning	Yes	☒	Explain
Time Format	h:mm:ss(8:05 AM)		Explain
Time Separator	:		Explain
Thousand Separator	,		Explain
Use Local Timezone	Yes	☒	Explain

830

1030

1060

Local intranet

FIG. 12

1200

Application Designer–Untitled–RC_CASE_HD.ENG(Page)

File Edit View Insert Build Debug Tools Layout Go Favorites Window Help

RC_CASE_HD.ENG (Page)

Page Designer | Order

	Lvl	Label	Type	Field	Record	Display Control	Related Field	Control Field	Page Field
1	0		SubPage						
2	0	Employee Informat	Group Box	EMP_INFO_GBO	DERIVED_RC_C				CUST_INFO_I
3	0	EmplID	Edit Box	EMPLID	DERIVED_RC_C				
4	0	ContactID	Edit Box	CASE_CONTACT	RC_CASE	☑			
5	0	Name	Edit Box	NAME_SEARCH	DERIVED_RC_C				
6	0	PersonID	Edit Box	PERSON_ID	RC_DRILLDOWN				
7	0	Business Unit	Edit Box	RC_BU_DESCR	DERIVED_RC_C				
8	0	Business Unit	Edit Box	BUSINESS_UNIT	RC_CASE				
9	0	Department	Edit Box	DEPTID	RB_WORKER		☑	4	
10	0	Location Code	Edit Box	LOCATION	RB_WORKER		☑	4	
11	0	Phone Type	Drop Down List	PHONE_TYPE	DERIVED_RC_C	☑			
12	0	Phone Type	Drop Down List	PHONE_TYPE	DERIVED_RC_C				
13	0	Business Unit	Drop Down List	BUSINESS_UNIT	DERIVED_RC_C				
14	0	Phone	Edit Box	PHONE	DERIVED_RC_C				
15	0	Extension	Edit Box	EXTENSION	DERIVED_RC_C				
16	0	Email Type	Drop Down list	E_ADDR_TYPE	DERIVED_RC_C				
17	0	Email Type	Edit Box	E_ADDR_TYPE	RC_CASE				
18	0	Email	Edit Box	EMAIL_ADDR	DERIVED_RC_C				
19	0	Preferred Contact	Drop Down List	RC_CONTACT_M	RC_CASE				
20	0	Preferred Contact	Edit Box	RC_CONTACT_I	DERIVED_RC_C				
21	0	Contact Details	Edit Box	RC_CONTACT_I	RC_CASE				
22	0		Edit Box	CONTACT_ID	RC_CASE				
23	0	Alt Contact	Edit Box	ALT NAME-SEA	RC_ALT_CNTC	☑		22	
24	0	Problem Informatio	Group Box	PROBLEM_INFO	DERIVED_RC_C				
25	0	Product	Edit Box	RC_PRODUCT_I	DERIVED_RC_C				
28	0	Product	Edit Box	PRODUCT_ID	RC_CASE				PROBLEM_IN

Untitled

D...   Up...

1250
1210A
1210B
1210J
1210K
1210R
1210Z

1220 1230 1240 1240 1240

Build / Find Object Reference / Upgrade / Results / Validate

Ready   CR800CA   NUM

FIG. 13A

RECEIVED

JUL 2 9 2002

Technology Center 2100

FIG. 13B

Administer Personalization Opt- Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back ·   ·   ·   Search   Favorites   History

Address   http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

PEOPLE SOFT

@ Home   (i) View Worklist   (?) Help   (+) Sign Out

Address Info   View All   First   1 of 1   Last   + −

Address Seq: 1

Address Detail   View All   First   1 of 1   Last   + −

1360

*Effective Date: 07/25/2001   1320   *Status: Active   ▸   1330

*Address Type: Business   ▸   *Address ID: 1208

Description:

Country: USA   United States

Address 1:   Peoplesoft Parkway

Address 2:

Address 3:

City: Pleasanton

County: Postal: 94505

State: CA   California

Time Zone: PST   ▸   Pacific Time, Tijuana   □ Submit   1335

Last Modified: 07/25/2001 2:36PM PDT   VP1

Phone Info   View All   First   1 of 1   Last

                                                                    Phone
*Phone Type   Description   Primary   Int'l Prefix   Telephone   Extension

Business   ▸   Desk   ☑   001   925 694 9479   + −

1310   1340   1350   255

Done   Local intranet

Address Detail

255

*Effective Date: 07/25/2001 1310 1360 1320

*Address Type: Business

Description:

Country: 1350 USA 🔍 United States

Address 1: Peoplesoft Parkway

*Status:

*Address ID:

FIG. 13C

FIG. 13D

Administer Personalization Opt – Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

⇐ Back ▾ ⇒ ▾ ⊗ ⊠ ⌂ | ⊘Search ☆Favorites ⏱History | ⊟▾ ⊜ Ⓦ ▾ ☆ ⊗ | ⊿ | A▾ åℊ▾

Address 🔗 http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

PEOPLE Soft

@Home   Ⓜ View Worklist   ⍰ Help   ⊕ Sign Out

Address Info   View All   First ◀ 1 of 1 ▶ Last

Address Seq: 1

Address Detail   View All   First ◀ 1 of 1 ▶ Last   [+] [−]

*Effective Date: 07/25/2001   📅   — 1320   *Status: Active ▾   — 1330
*Address Type: Business ▾ 🔍   *Address ID: 1208 🔍
Description:
Country: USA 🔍 United States
Address 1:   Peoplesoft Parkway
Address 2:
Address 3:
City: Pleasanton
County:
State: CA 🔍 California
Time Zone: PST ▾ Pacific Time, Tijuana
Last Modified: 07/25/2001 2:36PM PDT   VP1

Postal: 94505

□ Submit   — 1335

Phone Info   View All   First ◀ 1 of 1 ▶ Last   [+] [−]

*Phone Type   Description   Primary   Int'l Prefix   Telephone   Phone Extension

Business ▾   Desk   ☑   [001]   925 694 9479   [+] [−]

Done   🖳 Local intranet

1310
1340
1350
255

RECEIVED

JUL 2 9 2002

Technology Center 2100

FIG. 13E

Self Service User Profile—Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back • → • ⊗ ⊗ ⚙ | ⚲Search Favorites ⚙History | ⬛ • ⬛ ⬛ • ⬚ ⬛ | A • âğ •

Address ⬛ http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

PEOPLE
Soft

Home>PeopleTools>Maintain Security>Use> My Profile

@Home   @ View Worklist   (?) Help   (+) Sign Out

New Window

Personalization

Option		Default Value	Override Value	
Accessibility Features		No	☑	Explain
Tab over Add/Del Buttons (+/-)	⊞	No	☑	Explain
Afternoon designator (PM, pm)		PM		Explain
Tab over Calendar Button	⬛	No	☑	Explain
Currency Symbol		$		Explain
Currency Symbol Position		Leading	☑	Explain
Decimal Separator		.		Explain
Date Format		MM/DD/YY	☑	Explain
Date Separator		/		Explain
Local Time Zone		Pacific Time, Tijuana	☑	Explain
Morning designator (AM, am)	⊞	AM		Explain
Multiple Row Insert		Yes	☑	Explain
Save Configuration		Yes		Explain
Save Warning		Yes	☑	Explain
Time Format		h:mm:ss(8:05 AM)		Explain
Time Separator		:		Explain
Thousand Separator		.		Explain

1370

Local intranet

FIG. 14A

Permission Lists - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back • Search Favorites History

Address http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&   Go

Home>PeopleTools>Maintain Security>Use> Permission Lists

Home   View Worklist   Help

New Window

General | Pages | PeopleTools | Process | Sign-on Times

Permission List: ALLPANLS

Description: All Panels

Find | View All   First 1-65 of 65 Last

Menu Name	Edit Components
ADMINISTER_SECURITY	Edit Components
APPLICATION_ENGINE	Edit Components
APPMSGMONITOR	Edit Components
CALLCENTER	Edit Components
CIC_PAGELETS	Edit Components
CNV_SCHEMA_MAP	Edit Components
CRM_OPEN_WORKLIST	Edit Components
CRM_PORTAL_COMPONENTS	Edit Components
CRM_TRANSFORM_UTILITY	Edit Components
CTI_CONFIGURATION	Edit Components
CUBE_MANAGER	Edit Components
EDI_MANAGER	Edit Components
ESTABLISH_BUSINESS_UNITS	Edit Components
MAINTAIN_PRODUCT_CONFIGURATOR	Edit Components
MAINTAIN_SECURITY	Edit Components
MAINTAIN_SOLUTION	Edit Components

1495 1420A 1420B 1410 255 1420P

1430 1440 1450 1460

Sign Out

Links

Done   Local intranet

FIG. 14B

—1470

Grid Properties ⊠

| General | Columns | Label | Use |

┌─ **General Attributes** ─
Main Record: [PSACLMEMU ▼]

Page Field Name   [PSACLMEMU]

Occurs Level: [1]

Occurs Count: [15]   —1480

☐ Unlimited Occurs Count (rows)

—1490

[OK] [Cancel]

270

225

PEOPLE

| | ⊕ Home | ① View Worklist | ⑦ Help | ⊕ Sign Out |

Home>PeopleTools>Maintain Security>Use> Permission Lists   New Window

| General | Pages | PeopleTools | Process | Sign-on Times | ① |

Permission List: ALLPANLS

Description: All Panels

1410

1420A

Menu Name	Edit Components		
ADMINISTER_SECURITY	Edit Components	+	−
APPLICATION_ENGINE	Edit Components	+	−
APPMSGMONITOR	Edit Components	+	−
CALLCENTER	Edit Components	+	−
CIC_PAGELETS	Edit Components	+	−
CNV_SCHEMA_MAP	Edit Components	+	−
CRM_OPEN_WORKLIST	Edit Components	+	−
CRM_PORTAL_COMPONENTS	Edit Components	+	−
CRM_TRANSFORM_UTILITY	Edit Components	+	−
CTL_CONFIGURATION	Edit Components	+	−
CUBE_MANAGER	Edit Components	+	−
EDI_MANAGER	Edit Components	+	−
ESTABLISH_BUSINESS_UNITS	Edit Components	+	−
MAINTAIN_PRODUCT_CONFIGURATOR	Edit Components	+	−
MAINTAIN_SECURITY	Edit Components	+	−
MAINTAIN_SOLUTION	Edit Components	+	−
MANAGE_INTEGRATION_RULES	Edit Components	+	−
MASS_CHANGE	Edit Components	+	−
NVISION	Edit Components	+	−
PORTAL_ADMIN	Edit Components	+	−
PORTAL_COMPONENTS	Edit Components	+	−
PORTAL_PERS_HOMEPAGE	Edit Components	+	−
PROCESSMONITOR	Edit Components	+	−
PROCESS_SCHEDULER	Edit Components	+	−
QUERY_MANAGER	Edit Components	+	−
RA_CAMPAIGN_MANAGEMENT	Edit Components	+	−
RA_CM_STRUCTURE	Edit Components	+	−
RB_DEFINE_PRODUCTS	Edit Components	+	−
RB_GENERAL_OPTIONS	Edit Components	+	−
RB_INTEGRATION_OPTIONS	Edit Components	+	−
RB_MANAGE_COMPETENCIES	Edit Components	+	−
RB_MANAGE_CUSTOMER_INFORMATION	Edit Components	+	−
RB_MANAGE_WORKFORCE	Edit Components	+	−
RB_PROCESS_INBOUND_TRANS	Edit Components	+	−
RB_STRUCTURE_SEARCHING	Edit Components	+	−
RB_WORKER_CALENDAR	Edit Components	+	−
RC_SELF_SERVICE	Edit Components	+	−
RC_SOLN_MGMT	Edit Components	+	−
REPORT_BOOKS	Edit Components	+	−
REPORT_MANAGER	Edit Components	+	−
RF_AGREEMENTS	Edit Components	+	−
RF_DEFINE_ITEMS	Edit Components	+	−
RF_DEFINE_ITEM_CONTROLS	Edit Components	+	−
RF_MAINT_ENTITLEMENTS	Edit Components	+	−
RF_MANAGE_RMA	Edit Components	+	−
RF_SERVICE_ORDER	Edit Components	+	−
RF_STRUCTURE	Edit Components	+	−
RI_CIC_HOME	Edit Components	+	−
RI_INTERACTION	Edit Components	+	−
RI_SETUP	Edit Components	+	−
RM_DELTA_UTILITY	Edit Components	+	−
RSF_FORECAST	Edit Components	+	−
RSF_LEADS	Edit Components	+	−
RSF_OPPORTUNITY	Edit Components	+	−
RSF_PRTL	Edit Components	+	−
RSF_SETUP_TABLES	Edit Components	+	−
RSF_TERRITORY	Edit Components	+	−
STRUCTURE_PROCESS_AUTOMATION	Edit Components	+	−
STRUCTURE_RC	Edit Components	+	−
TRANSLATE	Edit Components	+	−
EDI_MANAGER	Edit Components	+	−
TREE_MANAGER	Edit Components	+	−
UTILITIES	Edit Components	+	−
WORKFLOW_ADMINISTRATOR	Edit Components	+	−
WORKLIST	Edit Components	+	−

Find | View All   First ◄ 1-65 of 65 ► Last

1420B

1420P

1420Q

FIG. 17A

— 275

Component Properties ⊠

| General | Use | **Internet** |

Search Page

Primary Action ○ **New** ⊙ **Search**

Default Search Action: | Update Display ▽ |

Default Search/Lookup Type: ⊙ **Basic** ○ **Advanced**

☑ Allow Action **M**ode Selection

Link To Access Add Page-- Message Set/Nbr: | 124 | | 62 |

Link To Access Search Page-- Message Set/Nbr: | 124 | | 63 |

Instructional Text-- 1710 Message Set/Nbr: | 124 | | 50 |

Multi-Page Navigation
☑ Display **F**older Tabs (top)
☑ Display **H**yperlinks (bottom)

Processing Mode
⊙ **I**nteractive ○ **D**eferred
☑ Allo**w** Expert Entry ─1730

1720 ─1740

Toolbar
Selected Toolbar Actions:

☑ Sa**v**e
☐ Return t**o** List
☐ Next in **L**ist
☐ **P**revious in List
☐ Ne**x**t Page in Component
☐ Previous Page in Component
☑ **R**efresh

☐ View Wor**k**lis
☐ Next in Work**L**ist
☐ **P**revious in WorkList
☐ A**d**d
☐ **U**pdate/Display
☐ Update/Displa**y** All
☐ **C**orrection

☑ **D**isable Toolbar

| OK | | Cancel |

FIG. 17B

255

RECEIVED
JUL 2 9 2002
Technology Center 2100

Person Component - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back   Search   Favorites   History

Address   http://localhost:7001/servlets/iclientservlet/peoplesoft8/?cmd=start&

Home   View Worklist   Help   Sign Out

PEOPLE
Soft

Address Info   View All   First   1 of 1   Last   +   -

*Address Seq: 1

Address Detail   View All   First   1 of 1   Last   +   -

*Effective Date: 07/25/2001   *Status: Active
*Address Type: Business   *Address ID: 1208
Description:
Country: USA   United States
Address 1:   Peoplesoft Parkway
Address 2:
Address 3:
City: Pleasanton
County:
State: CA   California   Postal: 94505
Time Zone: PST   Pacific Time, Tijuana
Last Modified: 07/25/2001 2:36PM PDT   VP1   Submit

1770   1780   1790

Expert Entry   1760

Phone Info   View All   First   1 of 1   Last   +   -

*Phone Type Description   Primary   Int'l Prefix   Telephone   Phone Extension

Business   Desk   001   925 694 9479

Done   Local intranet